

# Election 2023



## Campaign Finance Report and Forms Frequently Asked Questions (FAQs)

**Q.** Where are the campaign finance report template and forms located?

**A.** The campaign finance report and forms are located on the City's website at the following URL: <https://www.rockvillemd.gov/elections>. From that page, click the link **Running for Office**, then scroll down to the second section. The campaign finance report and forms to be used are outlined in red in the screen shot below. A sample campaign finance report as well as instructions for completing the Signed Affidavit and Schedule 5 are also provided.



### **Candidate Information Election Packet**

[Download our candidate packet](#) for the 2023 election or pick up a hardcopy at the City Clerk's Office in City Hall, Monday-Friday from 8:30 a.m.-5 p.m.

We now offer a selection of required Section 5 documents to be completed online.

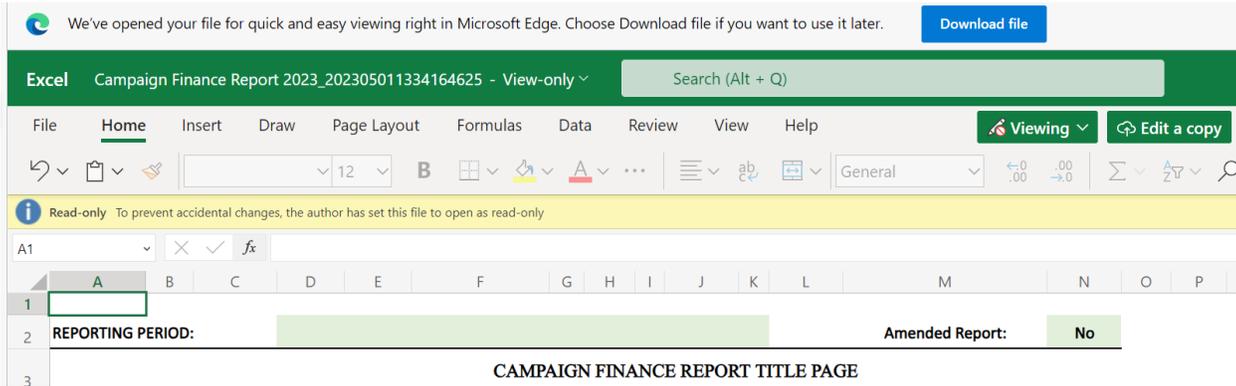
- [Campaign Finance Report Fillable Excel Spreadsheet](#)
  - [Sample Campaign Finance Report](#)
  - [How to: Campaign Finance Report](#)
- [Signed Affidavit](#)
  - [Help Instruction for Completing Signed Affidavit](#)
- [Schedule 5: Report on Loan to Campaign Committee](#)
  - [Help Instructions for Completing Schedule 5](#)

**Q.** Should I use a specific web browser to open the fillable Excel spreadsheet?

**A.** Different prompts will be displayed depending on the web browser you use to access the City’s website to download the fillable Excel spreadsheet. See screen shot below for two popular browsers.

**Microsoft Edge**

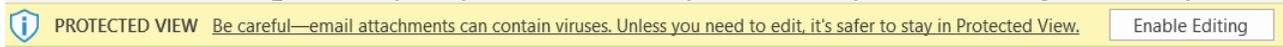
1. If using Microsoft Edge, the following screen will be displayed when you click on the link to the fillable spreadsheet



2. Click **Download file** then click **Open File** when the download prompt appears



3. Click “Enable Editing” when prompted. Excel will open a blank spreadsheet for you to complete.



**Firefox**

1. When you click on the link to the fillable spreadsheet, the spreadsheet will automatically download.
2. Click the name of the file to open Excel.



3. Click “Enable Editing” when prompted. Excel will open a blank spreadsheet for you to complete.



**Q.** How do I save my Campaign Finance Report?

**A.** Once you have downloaded it, click **File, Save As** and select the location on your computer. You can use whatever file name you want – example “My Initial 2023 CFR”.

**Q.** When entering a date, I received an error message indicating the date was outside the reporting period. What caused this error?

**A.** The date fields within the campaign finance report take advantage of Excel’s Data Validation feature. Each reporting period reflects a specific range of valid start and end dates. Please refer to the valid date ranges for each reporting period in Section 5 of the instructions. If you encounter this error, click the Retry button and enter a valid date for the appropriate reporting period.

REPORTING PERIOD: Initial Pre-Election Report (11/09/2022 through 10/3/2023)

**SCHEDULE 1: CONTRIBUTIONS AND OTHER RECEIPTS**

Name of Campaign Committee/Political Committee:  Nothing to report on this schedule for this reporting period.

(1) (2)

**SECTION 1: Contributions/Receipts other than Sections 2, 3, or 4**

Ref No.	Date	Name	Address	Method	Source
1	6/13/2022	Erica Smith	111 Oak View Drive Little Place, MD 20859		Campaign Committee
2	6/17/2023	Kaylee M, Davisson	14567 Old Fence Court Rockville, MD 20850	Pay Pal or Other Similar Method	General Contribution (Campaign and non-Campaign Committee)
3	9/20/2023	Jones Printing Company	3456 Rockville Pike, Rockville, MD 20851	Check	Other Receipts

Microsoft Excel STOP! Date entered is outside the reporting period. [Retry] [Cancel] [Help]

**Q.** On Schedule 1, when I selected a source of “Other Receipts”, a message in red text appeared to the right of column 6. What is going on?

(3)	(4)	(5)	(6)
Address	Receipt Type	Source	Amount
111 Oak View Drive Little Place, MD 20859	Cash	General Contribution (Campaign and non-Campaign Committee)	100.00
14567 Old Fence Court Rockville, MD 20850	Pay Pal or Other Similar Method	General Contribution (Campaign and non-Campaign Committee)	150.00
3456 Rockville Pike, Rockville, MD 20851	Check	Other Receipts	37.00
			Refund on August printing purchase

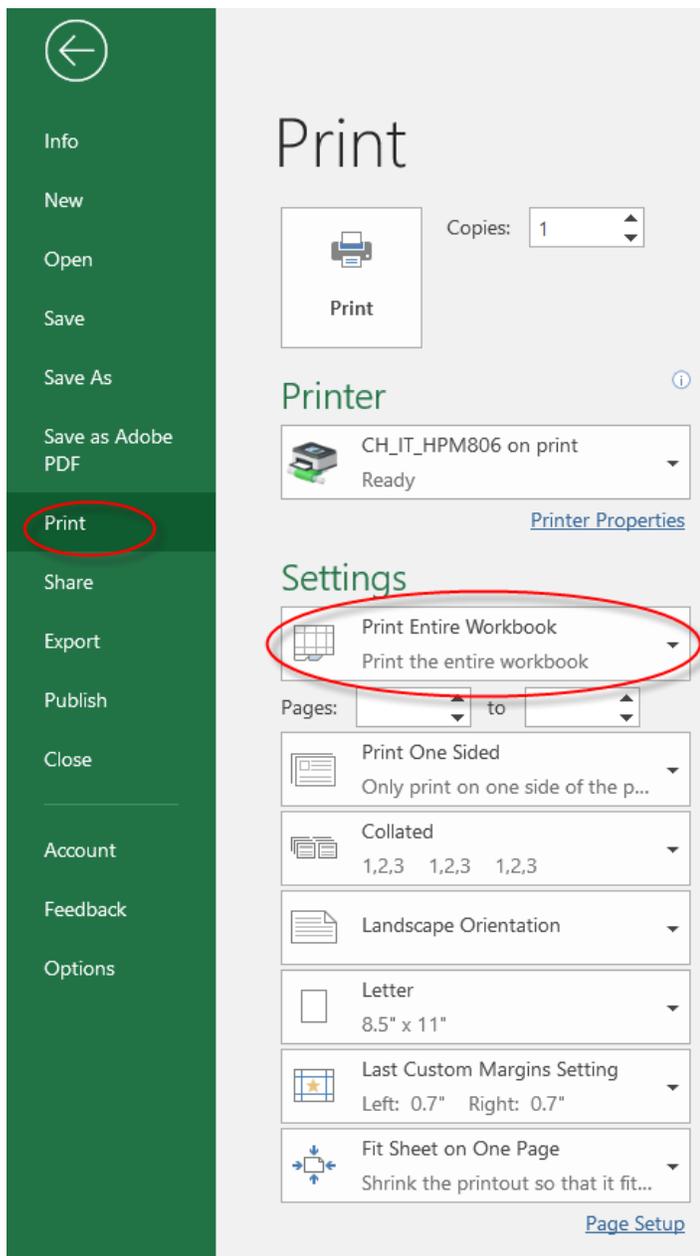
For Source OTHER, Enter a Brief Description

Must enter a description in Column 6

**A.** As described in the instruction packet, a source type of “Other Receipts” *requires* a brief description in column 6 on Schedule 1. After entering a description in Column 6, click on the message in red text and press delete.

**Q.** How do I print the entire report? (assumes you created the report using the Excel file provided by the Board).

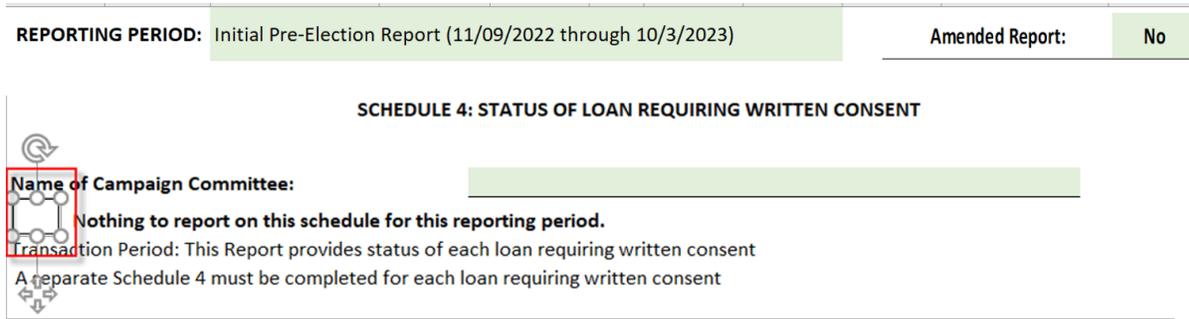
**A.** Click **File**, **Print**. Under the Settings section, click the drop-down arrow and select the option to **Print Entire Workbook**. Click the **Print** button.



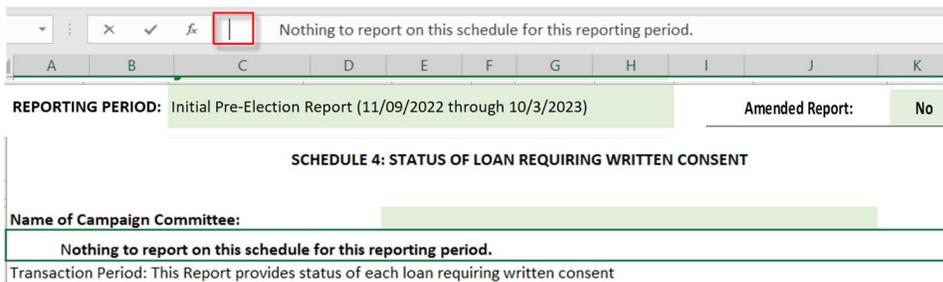
**Q.** I’m using the MAC version of Excel and cannot type an X to indicate “Nothing to report on this schedule for this reporting period” on Schedule 4 in Column A, Row 6.

**A.** In the MAC version of Excel, a **picture** of a box appears in Column A, Row 6 and therefore you cannot enter text in that location. Follow the steps below to resolve this issue on any of the schedules in your campaign finance report.

1. Unprotect the sheet.
2. Click in the little square box. In the Mac version it is a “picture”. It will then appear as shown in the screen shot below with little handles around it.



3. Press the **delete** key to get rid of the box.
4. Click in front of the text “Nothing to report on this schedule for this reporting period” and type an X. Refer to screen shot below as to where to position the cursor.



5. Protect the sheet again.
6. You may now continue completing your Campaign Finance Report.

**Q.** How do I add more rows to a schedule?

**A.** To insert a row, position the mouse where you want to insert the row, then click **Home, Insert (click the down arrow), Insert Sheet Rows**. Repeat this step to add additional rows.



**Note:** Be sure to continue the numbering in the Ref. No column on Schedules 1, 2 and 3. Also, verify that the subtotal calculations are correct after adding additional rows.

## Electronic Signature Process Using DocuSign

**Q.** My Excel file is complete so how do I begin the electronic signature process?

**A.** The treasurer needs to sign the affidavit and upload the completed CFR. Once this has been completed, DocuSign sends an email to the candidate for review and signature. The candidate will then sign. Once the candidate clicks the FINISH button, an email with copies of the report and the signed affidavit will be sent to [campaignfinancereport@rockvillemd.gov](mailto:campaignfinancereport@rockvillemd.gov), the candidate and the treasurer.

**Q.** Who receives email messages addressed to [campaignfinancereport@rockvillemd.gov](mailto:campaignfinancereport@rockvillemd.gov)?

**A.** Emails are received by the City Clerk/Director of Council Operations. Once received, the City Clerk will send an email confirming receipt. The signed affidavit along with the campaign finance report will be posted to the City's website within 24 hours.

**Q.** My treasurer informed me he/she completed the electronic signature process and uploaded my completed campaign finance report, but I did not receive an email with the attachments.

**A.** The email message from **City of Rockville via DocuSign** may have been delivered to your SPAM or JUNK mail folder so be sure to check in folders other than your Inbox.

**Q.** I received the email from DocuSign along with the attachments. What are the next steps?

**A.** Click on **View Completed Documents** within the body of the email. You may want to save a copy of the signed affidavit for your records. Your campaign finance report will appear as a PDF attachment. The Excel version of your campaign finance report remains on the device to which it was saved.

DocuSign NA3 System <dse\_NA3@docusign.net>

To: Frank B. Poland (FB\_Poland@COR-Millworks.com)

 If there are problems with how this message is displayed, click here to view it in a web browser.

